



bcmb

BEVERAGE CONTAINER
MANAGEMENT BOARD

REQUEST FOR PROPOSAL (RFP)

Dynamics CRM Support

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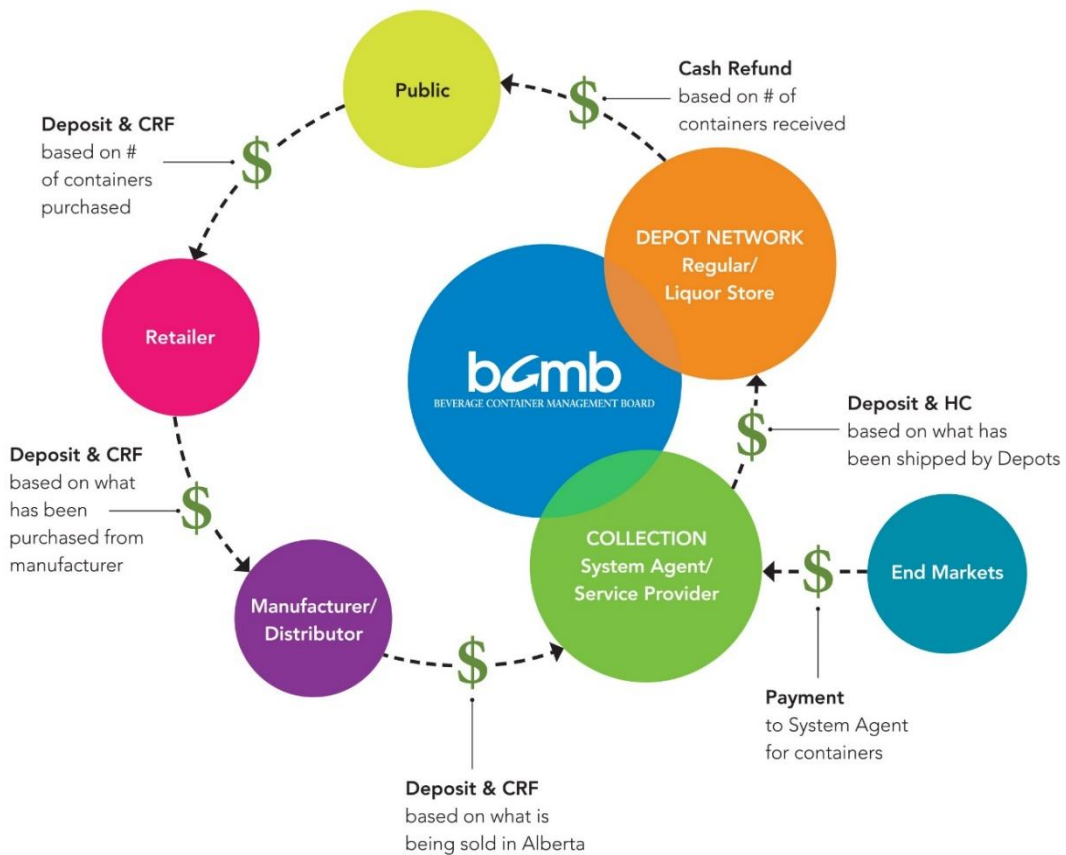
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Date: January 3, 2025
Submission Deadline: January 31, 2025, 14:00 (MST)

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1. BACKGROUND

The Beverage Container Management Board (BCMB) is a Delegated Administrative Organization (DAO) created through legislation to aid the Ministry of Environment and Parks in achieving its goals and objectives. The BCMB is a not-for-profit organization formed by representatives of Alberta beverage manufacturers, depots and the public (environmental organizations, municipalities and interested citizens). The BCMB is charged with the responsibility of regulating and delivering Alberta’s beverage container system. Since its inception on December 1, 1997, the BCMB has worked to ensure that Albertans have access to a convenient, innovative, and cost-effective system for recycling and reusing used beverage containers. For further information on our organization please go to our website at www.bcmb.ab.ca.

SYSTEM CASH FLOW (\$)



Cash Refund/Deposit: 10¢ (1 litre or less) and 25¢ (over 1 litre) for each container
Container Recycling Fee (CRF): Non-refundable – based on type of container
Handling Commission (HC): Payment to depot for sorting and handling container

The BCMB and its industry stakeholders work in partnership to ensure that beverage manufacturers register all ready-to-drink and sealed beverage containers before sales in the province of Alberta. The registration process ensures that system players are identified and that containers can be reviewed,

cataloged, and tracked as they move through the lifecycle. This also ensures the appropriate fees are collected to manage the container through its recycling cycle and fund the beverage container recycling system.

The BCMB has recently undergone a complete modernization of the current stakeholder management system and is now looking for a partner that can provide basic support of this system.

2. NEW STAKEHOLDER MANAGEMENT SYSTEM (SIMS)

The new stakeholder management system is based entirely in the Microsoft cloud and relies on three key technologies. This section will provide a high-level detail of the environment to help with understanding the scope of work.

2.1 Microsoft Dynamics 365 Customer Engagement

Microsoft Dynamics 365 is used for the backend of the entire system. Numerous Power Apps unified interfaces are used to facilitate and streamline different functions within the system. Further customizations including custom scripts, tables and fields have been added to further expand the functionality.

Security configuration has been kept to a minimum and consists of five to six custom security roles. There are two outside stakeholders that access data within the system through the Dynamics REST API.

2.2 Microsoft Power Automate

Various functions within the system are automated using Power Automate Flows. These functions may include (but are not limited to), sending e-mail, adjusting field values or notifying system users. Triggers for the flows are both automated and manual (a button in the interface).

2.3 Microsoft Power Page Portals

BCMB stakeholder users interact with the system through three customized Power Portals. These portals are customized for each stakeholder user to provide custom features unique to their needs. Authentication to the portals is provided by either Active Directory B2C or Google cloud depending on the stakeholder.

3. SCOPE OF SERVICES

The BCMB invites vendors to submit a proposal that describes how their firm (or consortium) would provide the support outlined below.

1. Escalation of issues unable to be solved by in-house staff In-house staff are experienced in Microsoft dynamics and can often solve 85-90% of the problems.
2. Adjustments to views and dashboards within the Dynamics backend.
3. Modification of flows which may include:
 - a. Adjusting static content in templates

- b. Adjusting dynamic content in templates
 - c. Modifying triggers
 - d. Modification of flow logic
4. Adjustments to Portals which may include:
 - a. The addition of fields to pages
 - b. Locking or unlocking fields.
 - c. Altering data displays
5. Automated general maintenance items (flows to delete unnecessary data and logs).
6. Assisting with integration of in-house created flows into production system. Deployments through Dev-Test-Prod for those flows.

BCMB staff estimates about 8-10 hours of work per month.

Note – Any substantial changes deemed to be more than eight hours’ worth of work will be added to an enhancement list. The enhancement list will eventually be turned into a project outside the scope of this support contract.

4. TIMING

The BCMB would like to have a support contract in place by March 3, 2025. Commitment to meet this timeline is a critical component of RFP response.

5. RFP RESPONSE REQUIREMENTS

As a regulatory body, the BCMB utilizes a broad scope of information from various sources that can be confidential in nature. As such, we highly prioritize the security of our information technology environment and any additions or proposed changes to it. Information technology projects must be managed in accordance with best practices promoted by the nationally recognized [Project Management Institute \(PMI\)](#), appropriately tailored to the specific project requirements. All projects are expected to use the latest tools, resources, and dependencies in accordance with those industry best practices.

The response should include the following:

1. Methodological Approach - How support requests would be communicated, prioritized, solved and tracked.
2. Qualifications - Description, timing and scope of similar work assignments:
 - a. Experience with interface design.
 - b. Experience with Microsoft Dynamics 365.
 - c. Experience with Microsoft Power Automate.
 - d. Experience with software development practices.
 - e. Experience with Power Page Portals.
3. Ticket prioritization and expected response times.
4. Pricing - Pricing proposal (including onboarding costs).

6. REQUESTS FOR INFORMATION

Proponents may request additional supplementary information to gain a stronger understanding of the requirements and deliverables reflected in this RFP. These requests are subject to Section 8, “Confidentiality” and can be directed to the main contact of this document in Section 12.

7. SCHEDULE OF THE RFP PROCESS

The schedule of the RFP Process is as follows:

EVENT	DATE
1. Submission Deadline	January 31, 2025, 14:00 (MST)
2. Interviews with Short Listed Proponent Candidates	First week February 2025
3. BCMB Selection of Proponent	February 24, 2025
4. Support kick off	March 3, 2025

8. CONFIDENTIALITY

BCMB reserves the right to share RFP responses to the extent required to make an informed decision. RFP responses will not be shared with other proponents.

By submitting a proposal, the proponent agrees not to divulge, release, or otherwise use any information that has been given to it or acquired by it from the BCMB on a confidential basis as a result of or during the course of the RFP process.

All proposals submitted to the BCMB are considered as confidential and will not be shared with other parties unless in accordance with the Freedom of Information and Protection of Privacy Act (FOIP).

The BCMB is required to comply with the FOIP Act while carrying out its powers, duties and functions. Proponents are asked to identify information contained in their proposals that is submitted on a confidential basis. Subject to its obligations under the FOIP Act, the BCMB will hold in confidence any such information submitted by a proponent. However, the BCMB reserves the right to distribute information about any proposal internally to its own directors, officers and employees and to its consultants where the distribution of that information is considered necessary by the BCMB.

9. GENERAL CONDITIONS

Proponents are solely responsible for their own expenses in preparing a submission and for subsequent negotiations with the BCMB. The BCMB will not be liable to any proponent for costs, expenses, damages, loss of anticipated profit or any other claims by a proponent in connection with or arising out of this RFP.

By participating in this RFP process, the proponent agrees that neither the BCMB nor its directors, officers, employees, agents or other representatives shall be liable to the proponent for any action, cause of action, suits, debts, dues, sums of money, damages, costs, claims and demands of every nature and kind at law or in equity or under statute whatsoever arising out of or in any way connected with this RFP or the performance of any work or services in relation to this RFP.

The proponent further agrees that the award of approved status in connection with this RFP is in the sole discretion of the BCMB and in no event shall the proponent seek injunctive or other relief to prevent or delay the award of approval in connection with this RFP or the performance of any work or services in relation to this RFP.

This RFP should not be construed as an agreement to purchase goods or services. The lowest priced or any submission will not necessarily be accepted and the BCMB is not bound to enter into a contract with any proponent.

Notwithstanding any other provision in this agreement, the BCMB, in its sole discretion, shall have the right to do any or all of the following:

- Accept any submission;
- Reject any submission;
- Reject all submissions;
- Discontinue this RFP process without obligation or liability to any proponent; and
- Negotiate terms with any proponent.

Any submission which does not meet the requirements of this RFP, or which includes qualifications to the requirements of this RFP, may be rejected. However, notwithstanding anything to the contrary contained in this RFP, the BCMB may elect to retain any such submission for consideration and may waive any RFP requirements on such terms and conditions as the BCMB may consider appropriate, and the submission may be considered by the BCMB in the same manner as a submission that fully conforms to the requirements of this RFP.

All unsuccessful submissions will be returned to the proponent it was submitted by and will be removed from all BCMB records.

Note that the BCMB will be the sole owner of the resulting visual analytics tool upon completion of any agreement resulting from this RFP.

10. EVALUATION OF RFP RESPONSES

BCMB will evaluate and select a successful RFP response based on the following information:

1. BCMB will evaluate each RFP response separately against the RFP's requirements.
2. During the evaluation process, RFP Respondents may be required to provide additional information, to participate in an interview and/or to clarify statements made in their RFP response.
3. BCMB will rate each RFP response on a scale of 1 (unacceptable) to 10 (exceeds) and will use the following weightings:
 - Industry Knowledge and System Understanding 15%

- Relevance and Breadth of Experience/Qualifications 40%
- Methodological Approach 30%
- Price/Budget 15%

11. SELECTION OF PROPONENT AND NEGOTIATION OF CONTRACT

If the BCMB selects a preferred proponent, it may enter into a contract with the preferred proponent, or enter into negotiations with the preferred proponent to attempt to finalize the terms of the contract including amendments to the scope of services and the price set out in the preferred proponent’s proposal.

If at any time the BCMB reasonably forms the opinion that a mutually acceptable agreement is not likely to be reached within a reasonable time, the BCMB may give the preferred proponent written notice to terminate discussions, in which event the BCMB may then open discussions or negotiations with another proponent or proponents, or may terminate the RFP.

Notice in writing to a proponent that it has been identified as the successful proponent and the subsequent execution of a written contract will constitute a contract for goods and services and no proponent will acquire any legal or equitable rights relative to the provision of goods and services until the occurrence of both these events.

12. CONTACT

Any questions concerning the RFP requirements are to be directed to:

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